**Phone Script for Potential Reinstatement for Members Dropped 3-5 Years from the Order**

**Overall Directions**

**This script is designed for contacting potential members that dropped their membership 3-5 years ago. This script assumes that your lodge is doing something new that a past member might be interested in or, that some anxiety provoking situation has been resolved or is in the process of being resolved.**

**As a caller, you know your lodge and potential issues or reasons a member might have left. If uncertain, talk to the Lodge Secretary, Past ERs or others BEFORE CONTACTING THE PAST MEMBER. This will allow you to adapt the script as needed.**

**This script is designed to get you started. It is important that you discuss the issues as you are engaging in a conversation and that you care about the person and how they are doing. Thus, the conversation is one of providing information, NOT a hard-recruiting cold call.**

**Again, this is a team effort. When making these calls, it is important to be coordinated, empathetic, caring etc. Make sure you have talked with past leaders and the lodge secretary, etc. before you make the call.**

**Specific Directions**

1. **The lodge leadership must decide who to contact (Members from 3, 4, or 5 years ago)**
2. **It is suggested not to contact individuals older than some specific age group (You need to decide that age).**
3. **Using CLMS, the lodge secretary needs to identify members that dropped from the roles during the time period selected and make a list with contact information.**
4. **The lodge secretary must be available to take money when calls are being made in order to receive funds over the phone by credit card.**
5. **There must be some individuals willing to travel to get checks. It may be the caller.**
6. **We suggest all calls be made from the lodge to assist with coordination.**
7. **Although a membership committee or others may make the calls, ALL LODGE LEADERS must be involved with this effort.**
8. **All lodge leaders must be flexible to deal with issues members bring up as soon as possible.**

**Directions for Callers:**

1. Have the Phone-a-Thon Questionnaire available for each member when you call.
2. Know how to pay dues. Have the lodge secretary explain the procedure if needed.
3. Before the call is placed, fill in the member information and your information on the Phone-a-Thon Questionnaire.
4. Have a class of water or coffee near you in case your throat gets dry.
5. IMPORTANT: This is a “Live” script that requires provides you with statements depending on what the person says. Thus, you need to read through each of the scripts at least once and know where to go when the person first starts discussing reasons why they do not want to remain a member.
6. Say the script out loud to a stuffed animal or practice with another member or lodge secretary. Practice before you make the first two calls. The conversation will be smoother, and you will have more confidence when making the first few calls.
7. What you say is printed in Black, the directions are printed in Red. However, adapt the script as needed.
8. Stay calm, relaxed and LISTEN to what the person is saying. Think of this script like calling a friend. Adapt the script as needed but try to use the model as close as possible.
9. **Last. !!!!!!YOU CAN DO THIS!!!!!!**

**Script**

**Hello \_(Insert Person’s First name)\_, I am \_(Insert your Name and Title if you have one**) **from the** (**insert the Lodge name or say the Elks if well known**). **How are you doing today?**

Allow the person to talk

**Say, I am reaching out to you today because you dropped your Elks membership \_\_\_\_ years ago and I would like to tell you about some things that have changed in the lodge since you left.**

**Identify two or three things.**

**Item 1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Item 2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Item 3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Once done, then say, How do those things sound to you?**

**Allow the person to talk.**

**Then say: Would any of those reasons make you reconsider becoming an Elk in our lodge again.**

**Allow the person to talk. Go to the appropriate Skip Page**

**If the Person Says**

**THEY WANT TO BECOME A MEMBER AGAIN**

**Say I am truly glad to hear that. I will tell the lodge secretary about your decision and they will be calling you in a few minutes about the reinstatement procedure. I am looking forward to seeing you at the Lodge again.**

**Before I go, is there anything else you would like to say.**

**Allow the person to talk**

**Say, It was good talking to you today. Have a good day. Or something similar.**

**If the Person Says**

**NO ONE EVER CONTACTED ME WHEN I DROPPED**

**Say I will make no excuses for people not calling you and I apologize for that behavior. I can understand your frustration. Can you tell me a little bit about what was happening when you did drop?**

Allow them to respond. Check all reasons they describe on the Questionnaire about why they do not want to remain

Say, **I totally understand how you would feel this way about** [(insert issue(s)]. **It must be frustrating when things like this happen.**

**IF THE RESONS HAVE BEEN ADDRESSED**

**SAY: I can assure you that \_\_\_\_\_ insert reason(s) have been addressed. Then discuss the outcome of what happened**

**Then say. Considering things have changed at the lodge since you left, would you consider becoming a member again?**

**If YES, say I am truly glad to hear that. I will tell the lodge secretary about   
 your decision and they will be calling you in a few minutes about the   
 reinstatement procedure. I am looking forward to seeing you at the Lodge   
 again.**

**Before I go, is there anything else you would like to say.**

**Allow the person to talk**

**Say It was good talking to you today. Have a good day. Or something similar**

**If NO, Say. Considering the issue(s) you described has(ve) been addressed, can you tell me a bit more about why would not become a member again?**

Allow them to respond. Check all reasons they describe on the Questionnaire about why they do not want to remain

Say, **I totally understand how you would feel this way about** [(insert issue(s)]. **It must be frustrating when things like this happen. Would you be willing to allow me to attempt to resolve this (these) issue(s)?**

**If yes,** **Ok. I will talk with the other lodge officers** (or others if appropriate) **and either I or someone else will call you as soon as** (insert the Lodge leaders or others) **get together. In the short term, is there anything else you would like to discuss?** **DO NOT DISCUSS BECOMING A MEMBER OF THE LODGE, PAYING DUES, ETC. UNLESS THE PERSON BRINGS IT UP**

**If No, Say,** **Thanks again for talking with me today. We truly appreciate your feedback. Again, I will talk with** (Insert names) **about this issue. Hopefully, we can resolve it and someday you might consider becoming a member again.**

**Close with:**

**Have a great day or something similar.**

**IF THE ORGINAL REASON(S) FOR DROPPING HAVE NOT BEEN ADDRSSED**

**SAY: Would you be willing to allow me to attempt to resolve this (these) issue(s)**

**If yes,** **Ok. I will talk with the other lodge officers** (or others if appropriate) **and either I or someone else will call you as soon as** (insert the Lodge leaders or others) **get together. DO NOT DISCUSS BECOMING A MEMBER OF THE LODGE, PAYING DUES, ETC. UNLESS THE PERSON BRINGS IT UP**

**In the short term, is there anything else you would like to discuss?**

If yes, repeat the process above  
**If No, Say,** **Thanks again for talking with me today. I truly appreciate your feedback. Again, I will talk with** (Insert names) **about this issue. Once done, I will have someone call you.**

**Close with:**

**Have a great day or something similar.**

**Record the information on the Phone-a-Thon Questionnaire. Discuss the issue to the appropriate individuals within two days.**

**If the Lodge Member Says They are Too Old Say:**

**We understand members sometimes believe they are too old for the order or have difficulty getting to the lodge. If we could assist getting you to the lodge, would you consider becoming a member again?**

**If Yes, say**, **Great. I will talk with the Lodge Secretary and see what we can do. They will contact you to see what arrangements can be made and the reinstatement process. How does that sound to you?**

**If No, say,** **That is fine. We understand there comes a time when being an Elk is no longer a priority in one’s life. If there is anything the lodge can do for you in the future, please let us know.**

Once Done Say, **Before I go, is there anything you want to tell me about issues you have or improvements we can make in our lodge?**

Allow to talk and record information appropriately

Close with, **It was good talking to you today. Take care and have a great day or something similar.**

Record the information on the Phone-a-Thon Questionnaire

**When a Member Indicates**

**THEY DO NOT WISH TO BECOME AN ELK AGAIN**

**Say, Can you tell me a bit more about why you dropped your membership**

Allow them to respond. Check all reasons they describe on the Questionnaire about why they do not want to remain

Say, **I totally understand how you would feel this way about** [(insert issue(s)]. **It must be frustrating when things like this happen.**

**Note: (If there are multiple reasons say) Of these reasons, which is your top reason for not wanting to remain a member.** (Circle the answer on the Phone-a-Thon Questionnaire)

**Would you be willing to allow me to attempt to resolve this (these) issue(s)?**

**If yes,** **Ok. I will talk with the other lodge officers** (or others if appropriate) **and either I or someone else will call you as soon as** (insert the Lodge leaders or others) **get together. In the short term, is there anything else you would like to discuss?** **DO NOT DISCUSS BECOMING A MEMBER OF THE LODGE, PAYING DUES, ETC. UNLESS THE PERSON BRINGS IT UP**

If yes, repeat the process above

**If No, Say,** **Thanks again for talking with me today. We truly appreciate your feedback. Again, I will talk with** (Insert names) **about this issue.**

**Close with:**

**Have a great day or something similar.**

**Record the information on the Phone-a-Thon Questionnaire. Discuss the issue to the appropriate individuals within two days.**

**FOLLOW-UP CALL**

**If you called the member before, modify the introduction sentence below as needed**

**Hello** (insert member’s name). **This is** (insert your name) **from the Elks. A bit ago you discussed [Insert the issue(s)] with (ME or Insert Person’s Name). We would like to follow up with that conversation and tell you what happened since then**

Inform the person about the outcome

Once done say, **How does that resolution sound to you?**

Allow them to talk.

Say, **Based on your comment (s), how do you feel about remaining a member in the lodge now?**

Allow them to talk

**If Positive Say.**

**If the member needs to have someone collect the check say.**

**I will let the lodge secretary have someone come out to get the check and give you your card. When would be a good time for you today or tomorrow?**

**Indicate the day and time on the Questionnaire**

**If the member plans to pay by credit card say,**

**That is good to hear. Once we have finished talking, I will have (insert the secretaries name) call you in a few minutes.**

**Once Done Say,** **Before I go, is there anything you want to tell me about any other improvements we can make in our lodge?**

**If Negative to the Resolution Say**, **I am sorry to hear that. We were hoping that by resolving this issue you would consider remaining a member. What would need to happen for you to change your mind?**

Listen to the answer.

**If There is a Potential for a Resolution Say,**  **I will see what we can do about this and have ( insert name) call you.**

**If There is NO POTENTIAL for a Resolution Say,**  **Okay, I am sorry to hear that but understand. However, before I go, as an option, would you consider transferring to another lodge instead of dropping your membership?**

**If yes,** **I am glad to hear even though you do not like what is happening in ( insert lodge name), you still believe in the good works the Elks do. I will have the lodge secretary contact you and tell you the procedure. If you have not heard from them within one week, please reach out to me. Here is my personal phone number (\_\_\_\_\_\_\_\_).**

**If no, Okay, I understand your position. If there is anything we can do in the future to make you change your mind or if you decide to return, please feel free to call me or the lodge secretary.**

**Thanks again for your time. It was good to talk with you. I wish you well.**